BFI Film Forever

DISTRIBUTION AND EXHIBITION

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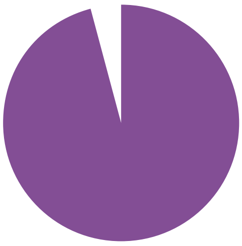
FACTS IN FOCUS

DISTRIBUTOR REVENUES



The **top 10 distributors** had a **96% share** of the theatrical market in the **UK and Republic of Ireland** in 2017 with **revenues of £1.3 billion**

TOP EARNING DISTRIBUTORS

Walt Disney

Overall top earning distributor with theatrical revenues of **£265m**

StudioCanal

Top earning distributor of UK independent films with theatrical revenues of **£45m** from these titles and total revenues of **£57m**

AVERAGE AD SPEND FOR UK FILMS IN 2017

UK studio-backed

£1.9m

UK independent

£0.2m

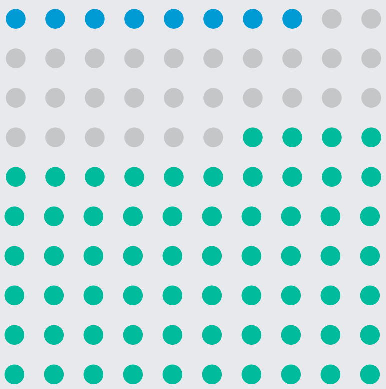
CINEMA TICKETS

The average ticket price at commercial cinemas in **2017** was **£7.49**, up from **£7.30** in **2016**

~~£7.30~~

£7.49

WIDTH OF RELEASE



In 2017, **8%** of films (63) were released at 500 sites or over, while **64%** of films (484) were released at 50 sites or under

UK CINEMA PROVISION

2016

766 cinema sites

4,150 screens

2017

774 cinema sites

4,264 screens

CINEMA OWNERSHIP

38%

64%

At the end of **2017**, the three largest exhibitors owned **38%** of all UK cinemas and **64%** of UK screens

SCREEN DENSITY IN THE UK

6.5 screens per **100,000** people, up from **6.4** in **2016**

DISTRIBUTION AND EXHIBITION

DISTRIBUTORS

The top 10 feature film distributors had a 96% share of the market in 2017 from the release of 284 titles (30% of all films on release). The same 10 distributors achieved a similar share in 2016 from 342 releases (34% of all releases). A further 117 distributors were involved in the theatrical release of films in the UK and Republic of Ireland in 2017, compared with 97 companies outside the top 10 in 2016. These distributors handled a total of 665 titles (70% of all releases) but generated only 4% of the total box office.

Table 1 shows box office takings by distributor for all films on release during 2017, and hence includes the box office takings of titles which were released in 2016 but remained in cinemas into 2017. The top earning distributor was Walt Disney, which handled four of the top 20 releases of 2017 including *Star Wars: The Last Jedi, Beauty and the Beast* and *Thor: Ragnarok* as well as some late 2016 releases which continued to generate significant box office in 2017, such as *Moana* and *Rogue One: A Star Wars Story.* The second highest earning distributor was Warner Bros which released three of 2017's top 20 titles including *Dunkirk* and *It*.

Table 1 Distributor share of box office, UK and Republic of Ireland, 2017

Distributor	Market share (%)	Films on release in 2017	Box office gross (£ million)
Walt Disney	19.7	16	265.2
Warner Bros	16.6	30	223.2
Universal	16.0	30	214.6
20th Century Fox	15.1	39	203.1
Sony Pictures	10.3	28	138.5
Lionsgate	6.3	36	84.1
StudioCanal	4.2	52	56.9
Paramount	3.7	13	50.2
eOne Films	2.5	33	33.3
Entertainment	1.7	7	22.3
Sub-total (top 10 distributors)	96.1	284	1,291.5
Others (117 distributors)	3.9	665	52.7
Total	**100.0**	**949**	**1,344.3**

Source: comScore

Notes:

The total number of films on release differs from Table 6 below, as here it includes all films on release in 2017, including titles first released in 2016.

Box office gross = cumulative box office total for all films handled by the distributor in the period 1 January 2017 to 31 December 2017.

Figures may not sum to sub-totals/totals due to rounding.

Table 2 shows the market share for the top 10 distributors annually over the past 10 years. In 2017, Walt Disney was the UK's leading distributor for the second consecutive year (and the second time in the decade covered in the table). The second highest earning distributor of 2017, Warner Bros, has headed the top 10 chart on three occasions over the period, whilst third placed Universal has topped the chart twice since 2008. The top independent distributor in 2017 was Lionsgate, whose titles included the top 20 film *La La Land.*

The same distributors consistently appear in the top 10. In all years up to 2012, with one exception, the major US studios took the leading places in the list with only six different independent distributors appearing in the top 10 over the period. However, following the consolidation of a number of the independents, this pattern is beginning to change and in 2017 two independents, Lionsgate and StudioCanal, were higher placed than Paramount. StudioCanal also appeared ahead of Paramount in both 2014 and 2015, and ahead of Sony Pictures in 2014, while eOne Films has ranked higher than Paramount and Sony Pictures in 2013, 2014 and 2016.

In the last few years, the share of box office generated by distributors outside the top 10 has ranged from 3.7% in 2014 to 7.8% in 2009.

Table 2 Distributor market share as percentage of box office gross, 2008-2017 (ranked by 2017 market share)

Distributor	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Walt Disney	9.9	12.4	14.0	8.7	10.2	15.2	10.1	20.0	23.2	19.7
Warner Bros	11.0	11.2	18.3	18.2	12.9	17.2	15.9	9.0	15.6	16.6
Universal	18.5	10.5	10.2	11.8	10.7	15.1	11.2	21.6	14.0	16.0
20th Century Fox	9.4	16.6	15.9	12.1	16.1	13.1	21.8	14.9	15.7	15.1
Sony Pictures	12.5	11.3	6.9	7.2	18.0	8.7	6.2	11.8	6.6	10.3
Lionsgate	2.5	2.9	3.5	-	5.7	4.7	5.5	4.0	4.0	6.3
Optimum/StudioCanal[1]	-	-	2.2	3.8	-	2.8	6.7	4.7	1.5	4.2
Paramount	16.9	10.8	14.8	16.3	7.7	7.8	5.8	4.0	5.4	3.7
eOne Films	-	4.9	5.5	5.1	6.7	9.0	8.0	3.9	8.4	2.5
Entertainment	8.0	8.6	2.5	6.7	3.1	1.9	5.2	1.6	1.5	1.7
Momentum[2]	3.5	-	-	4.6	4.3	-	-	-	-	-
Pathé	2.1	2.9	-	-	-	-	-	-	-	-
Top 10 total[3]	94.5	92.2	93.7	94.4	95.4	95.5	96.3	95.5	95.9	96.1
Others	5.5	7.8	6.3	5.6	4.6	4.5	3.7	4.5	4.1	3.9
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: comScore

Notes:

[1] Optimum Releasing, the UK subsidiary of StudioCanal, was rebranded as StudioCanal in September 2011.

[2] Momentum was taken over by eOne Films in January 2014.

[3] Top 10 total refers to the top 10 distributors of that particular year.

Tables 3 and 4 show the top 10 distributors of foreign language films and independent UK titles released in the UK and Republic of Ireland in 2017.

Foreign language films accounted for 46% of releases at the UK box office in 2017, grossing a total of £29 million (2% of overall box office). The high volume of foreign language releases is reflected by the number of companies in the UK handling such titles: 82 different distributors released foreign language films in 2017. As Table 3 shows, the top 10 distributors associated with these films released 80 (23%) of the total 349 titles. Hindi was the most popular non-English language for releases both in terms of numbers and box office revenues, with 52 titles taking £10.6 million. French and Tamil were jointly the next most popular foreign languages in terms of number of releases, with 35 each, but films in French earned more at the box office with takings of £2.7 million compared with £1.8 million.

Indian film distributor Yash Raj had the largest share of the foreign language box office overall with earnings of £3.2 million from five releases, while StudioCanal released the highest number of non-English language titles (20). StudioCanal does not appear in the table, however, as its earnings from foreign language releases place it outside the top 10. The highest earning foreign language film of the year overall was the Yash Raj release *Tiger Zinda Hai* (in Hindi), while the top earning non-Hindi language title was *Baahubali 2: The Conclusion* (in Tamil), the only film released by Hamsini Entertainment/DCP. The distributor of non-Indian foreign language films with the highest box office share was Curzon Artificial Eye (£3 million), whose titles included *The Handmaiden* (in Korean) and *The Salesman* (in Persian).

The table highlights the growing popularity of Polish language films in the UK: Polish film specialist Phoenix appears in the top 10 for the third consecutive year with earnings of £2 million from seven releases.

Table 3 Top 10 distributors of foreign language films in the UK and Republic of Ireland, 2017 (ranked by box office gross)

Distributor	Number of foreign language films released in 2017	Average widest point of release	Box office gross (£ million)
Yash Raj	5	85	3.2
Curzon Artificial Eye	11	36	3.0
Zee Studios	7	63	2.4
Phoenix	7	127	2.0
20th Century Fox	6	55	1.6
Hamsini Entertainment/DCP	1	80	1.4
B4U Network	13	18	1.2
Thunderbird Releasing	9	36	1.1
Grand Showbiz	17	19	0.9
Reliance Entertainment	4	58	0.9

Source: comScore, BFI RSU analysis

In total, 53 distributors released independent UK films in 2017, generating a combined box office gross of £133 million (10% of the total box office) from 139 releases. The 43 films released by the top 10 distributors of independent UK titles accounted for £127 million, which equates to 95% of the total box office generated by these films (Table 4). StudioCanal had the largest share of box office for UK independent film releases with earnings of £45 million from six films, including the category's highest earning film, *Paddington 2*, while Lionsgate had the highest number of releases (eight), which included titles such as *Their Finest*, *Churchill* and *The Limehouse Golem.*

Table 4 Top 10 distributors of UK independent films in the UK and Republic of Ireland, 2017 (ranked by box office gross)

Distributor	Number of UK independent films released in 2017	Average widest point of release	Box office gross (£ million)
StudioCanal	6	218	45.4
Sony Pictures	4	338	30.5
eOne Films	7	336	13.7
20th Century Fox	4	511	11.1
Universal	1	619	10.1
Lionsgate	8	229	9.2
Picturehouse	3	68	2.0
Altitude	3	85	1.9
STX Entertainment	1	463	1.7
Vertigo	6	94	1.7

Source: comScore, BFI RSU analysis

WIDTH OF RELEASE

Table 5 shows the numbers and percentages of films released in the UK and Republic of Ireland from 2010 to 2017 by widest point of release. The number of films released increased each year between 2010 and 2016, with the majority of the increase being accounted for by films shown at fewer than 50 sites. The total number of releases fell in 2017; again primarily due to the impact of the number of films shown at fewer than 50 sites. Each year, more than one third of releases were shown at fewer than 10 sites.

The number of films released at 500 sites or over has grown over the period, rising from 13 in 2010 to 63 in 2017. In previous editions of the Yearbook this has been the upper limit of our release width categories. However, as a growing number of titles have been released in recent years at 600 sites or over we have included data for this category for the first time; in 2017 there were 29 such releases. Films receiving the very widest releases are typically big budget blockbusters released by the distribution arms of the Hollywood studios. (The widest ever releases in the UK were those of the last three films in the Star Wars franchise which all went out on over 700 sites.) Overall, as a proportion of total releases, the number of films shown at 500 sites or over in 2017 represented 8% of the year's releases compared with 2% in 2010.

Table 5 Numbers and percentages of releases by widest point of release, 2010-2017

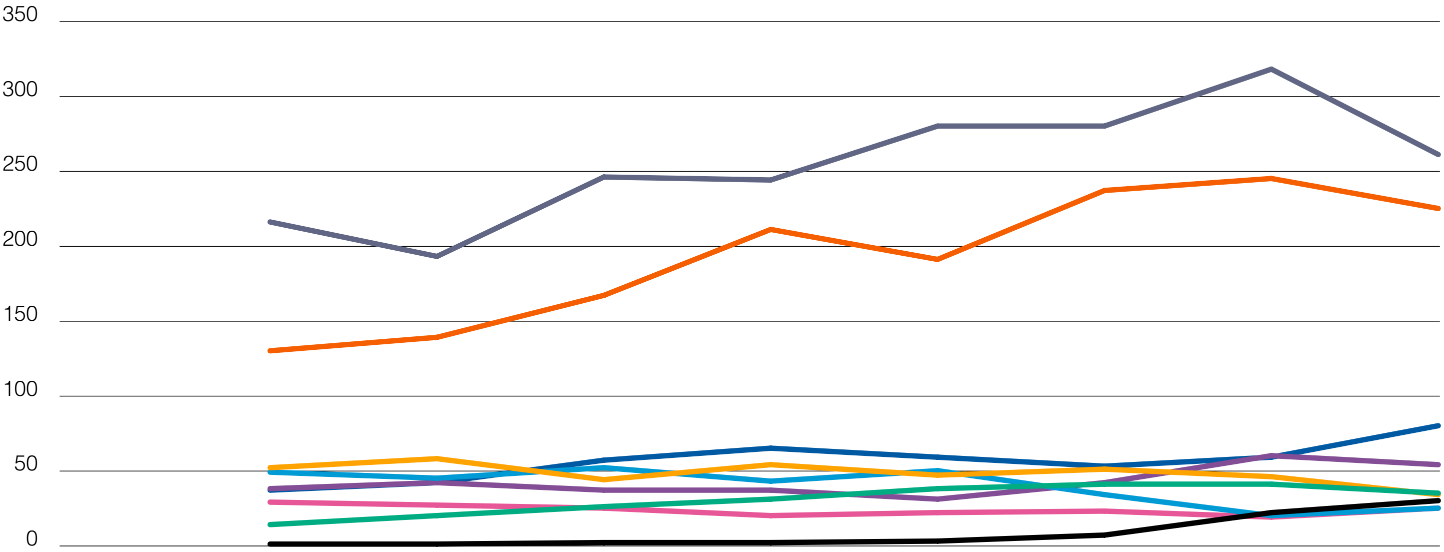
	2010		2011		2012		2013		2014		2015		2016		2017	
Sites at widest point of release	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases	Number	% of releases
>=600	0	0	0	0	1	0.2	1	0.1	2	0.3	6	0.8	21	2.6	29	3.8
500 - 600	13	2.3	19	3.4	24	3.7	30	4.3	37	5.2	40	5.3	40	4.9	34	4.5
400 - 499	51	9.2	57	10.2	43	6.6	53	7.6	46	6.5	50	6.6	45	5.5	33	4.3
300 - 399	48	8.6	44	7.9	51	7.9	42	6.0	49	6.9	33	4.3	19	2.3	24	3.2
200 - 299	28	5.0	26	4.7	24	3.7	19	2.7	21	2.9	22	2.9	18	2.2	24	3.2
100 - 199	37	6.6	41	7.3	36	5.6	36	5.2	30	4.2	41	5.4	59	7.2	53	7.0
50 - 99	36	6.5	41	7.3	56	8.7	64	9.2	58	8.1	52	6.9	58	7.1	79	10.4
10 - 49	129	23.2	138	24.7	166	25.7	210	30.1	190	26.7	236	31.1	244	29.7	224	29.5
<10	215	38.6	192	34.4	245	37.9	243	34.8	279	39.2	279	36.8	317	38.6	260	34.2
Total	**557**	**100.0**	**558**	**100.0**	**647**	**100.0**	**698**	**100.0**	**712**	**100.0**	**759**	**100.0**	**821**	**100.0**	**760**	**100.0**

Source: comScore, BFI RSU analysis

Note: Percentages may not sum to totals due to rounding.

As Figure 1 shows, between 2010 and 2017 more films were shown at fewer than 50 sites at their widest point of release than any of the higher release width bands. During the period, the number of films released at 200-299 sites has shown a gradual decrease, whilst the number of films released at 500 sites or over has increased year on year. In the other release width bands (50-99, 100-199, 300-399 and 400-499 sites) the numbers of releases vary and no consistent patterns are evident.

Figure 1 Numbers of releases by widest point of release, 2010-2017



	2010	2011	2012	2013	2014	2015	2016	2017
600+	0	0	1	1	2	6	21	29
500-599	13	19	25	30	37	40	40	34
400-499	51	57	43	53	46	50	45	33
300-399	48	44	51	42	49	33	19	24
200-299	28	26	24	19	21	22	18	24
100-199	37	41	36	36	30	41	59	53
50-99	36	41	56	64	58	52	58	79
10-49	129	138	166	210	190	236	244	224
<10	215	192	245	243	279	279	317	260

Source: comScore, BFI RSU analysis

WEEKEND BOX OFFICE

In 2017, just over 59% of box office revenue was generated at weekends (Friday to Sunday), compared with just under 59% in 2016 (Table 6). The pattern of box office takings by day has remained similar and is broadly consistent throughout the period with the exception of the middle of the working week, which was boosted for most of the period by the 'Orange/EE Wednesdays' promotion. Since the end of this promotion in February 2015, the box office share has become more evenly distributed across weekdays, although the current 'Meerkat Movies' promotion, which offers two-for-one tickets on Tuesdays and Wednesdays, is likely to be responsible for some of the recent increase in Tuesday attendances.

Table 6 Box office percentage share by weekday/weekend, 2008-2017

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Friday	16.7	16.4	16.0	16.6	16.4	15.8	15.3	15.3	16.1	15.7
Saturday	24.4	24.0	24.1	23.8	24.1	24.9	25.2	23.9	24.6	24.7
Sunday	18.3	17.8	18.5	17.6	17.6	18.2	18.8	18.8	18.3	18.9
Weekend	**59.4**	**58.2**	**58.6**	**57.9**	**58.1**	**58.9**	**59.2**	**58.1**	**58.9**	**59.2**
Monday	9.4	9.2	9.5	9.2	9.3	8.9	9.1	9.5	9.7	8.7
Tuesday	9.5	9.5	9.3	9.1	9.3	9.4	9.4	10.6	10.4	10.3
Wednesday	11.9	13.7	13.2	13.9	13.4	12.6	12.4	10.8	10.9	11.3
Thursday	9.9	9.5	9.3	9.8	9.8	10.2	9.8	10.9	10.1	10.6
Weekday	**40.7**	**41.8**	**41.4**	**42.1**	**41.9**	**41.1**	**40.8**	**41.9**	**41.1**	**40.8**
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: comScore

Note: Percentages may not sum to weekend/weekday sub-totals due to rounding.

Image: *Murder on the Orient Express* courtesy of Twentieth Century Fox.

The opening weekend is recognised as being crucial to the success of a film, both in cinemas and on subsequent release platforms. A good opening weekend, for example, may encourage exhibitors to continue to screen a film, and is likely to have a positive impact on the rest of the value chain, which is particularly important for independent films which do not have the backing of the major studios. For many films, opening weekend earnings represent a significant proportion of their final theatrical gross.

Table 7 shows the opening weekend box office as a share of total theatrical revenue over the past decade. In 2017, this share was just under 30%, a similar level to 2015 and 2016. The table illustrates that the highest earning films generally take the lowest percentage of their box office in the opening weekend. In 2017, the year's top film, *Star Wars: The Last Jedi*, earned £28 million over its four-day opening weekend, which represented 34% of its total theatrical gross (to 18 February 2018). Of the year's other top 20 films, those with the highest share of total box office taken on opening weekends were *Fate of the Furious* (47%) and *Thor: Ragnarok* and *Murder on the Orient Express* (both with 40%). However, three of the top 20 films took less than 20% of their total grosses on their opening weekends. *Dunkirk* generated just under 18% of its final gross during its opening weekend, *Paddington 2* earned 19% and *The Greatest Showman* earned 15% (to 18 February 2018). All of these titles were still being shown at over 20 locations 20 weeks after they were released.

Table 7 Opening weekend as percentage of total box office, by box office band, 2008-2017

	% of total in opening weekend									
Range of box office (£ million)	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
>30	21.7	18.8	27.4	29.4	27.0	24.0	27.1	32.2	27.2	26.5
20 - 30	31.0	23.0	35.8	22.6	22.4	30.9	21.9	25.9	28.0	33.3
10 - 19.9	29.2	32.2	26.1	27.6	24.6	27.6	30.9	25.6	29.1	28.5
5 - 9.9	27.6	26.1	26.7	26.2	26.1	28.4	25.9	28.7	32.2	33.2
1 - 4.9	27.4	30.3	30.4	32.2	31.8	32.1	30.3	32.3	33.1	32.1
0.2 - 0.9	34.1	35.5	31.9	35.5	37.7	37.0	36.7	37.3	37.7	35.1
<0.2	34.8	36.5	34.8	38.5	37.8	38.3	40.0	39.6	39.6	41.4
All films	**27.3**	**26.1**	**28.6**	**28.1**	**26.8**	**28.4**	**27.9**	**29.9**	**29.8**	**29.9**

Source: comScore, BFI RSU analysis

Note: Opening weekends include preview figures. For films with a limited initial opening, the wider release figure is included in the analysis.

RELEASE COSTS

Distributors invest heavily in advertising across all media (outdoor posters, print media, television, radio and online) in order to raise a film's profile with potential audiences. As Table 8 shows, the estimated total advertising spend by distributors in 2017 was £230 million, up 8% compared with 2016 (£213 million). However, as the number of film releases in 2017 (760) was down substantially compared with 2016 (821), the average advertising spend per film was up by almost one fifth (19%), rising from £0.26 million to £0.31 million.

While the overall spend by distributors in 2017 was higher compared with 2016, the spend on some traditional advertising platforms continued to decline. The spend on press advertising was the lowest of the entire period and was down 6% compared with 2016, while TV advertising spend (down 13% compared with 2016) was at its lowest since 2010. There were year-on-year increases, however, in expenditure on outdoor and radio advertising. Outdoor advertising spend was up 7% compared with 2016, while radio advertising spend increased by 112%.

Online advertising in 2017 saw the highest monetary increase in expenditure compared with the previous year; spending rose by £19 million (up 41%) to £65 million to make the internet the second most popular platform for film advertising for the first time in the period. However, 2016 and 2017 are the only two recent years where this data is comparable. Online advertising spend between 2013 and 2016 and in the years before 2013 is not comparable due to changes in the Nielson Media Research methodology used to collect this data. A new method, applied in October 2014, significantly reduced the estimation of online spend from Q2 2013 onwards, while a further update to methodology in 2015/16, which included changing the sampling approach and spend calculation, led to a substantial increase in terms of the estimated spend. It should be noted, however, that the advertising industry's own data indicate significant growth in online advertising revenues in the most recent years up to 2016.

Table 8 Estimated advertising spend 2008-2017 (£ million)

Medium	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
TV	79.3	74.3	76.0	90.8	89.1	89.2	101.0	102.2	93.3	81.1
Outdoor	56.2	57.0	61.0	69.1	67.2	71.2	64.2	60.5	52.8	56.5
Press	22.6	19.9	19.9	22.0	21.5	20.7	24.2	21.3	14.9	14.0
Radio	9.4	10.7	7.6	6.8	6.8	5.9	4.6	7.4	5.7	12.1
Sub-total	**167.5**	**161.9**	**163.5**	**188.7**	**188.1**	**187.8**	**194.0**	**191.4**	**166.7**	**163.7**
Internet*	4.5	6.4	6.1	8.5	4.0	2.5	*1.1*	*0.7*	*46.4*	*65.5*
Total	**172.0**	**168.3**	**170.6**	**197.2**	**188.6**	**189.4**	**195.1**	**192.1**	**213.1**	**229.5**

Source: Nielsen Media Research

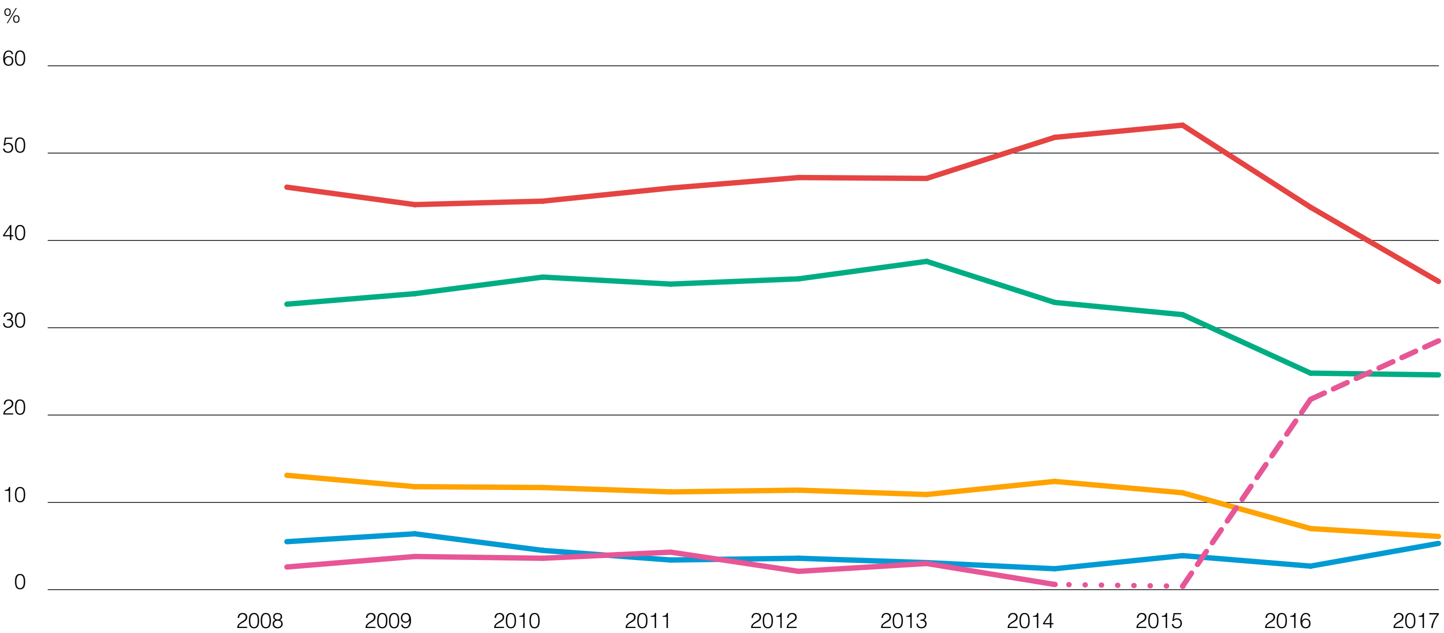
Notes:

Figures may not sum to totals due to rounding.

* The figures for 2013 onwards are not historically comparable; different methodologies were used for internet advertising spend for the periods 2008-2013, 2014-2015 and 2016-2017.

Figure 2 shows the share of advertising spend by medium since 2008. For most of the period the majority of advertising spend was allocated to TV and outdoor advertisements but in 2017, TV and internet advertising made up the largest share of overall spend. The combined share for TV and outdoor advertising has fallen significantly in the last two years; it was 82% in 2015, 69% in 2016, and only 60% in 2017. This decrease is mostly a reflection of the increased value of internet advertising (see above), which accounted for 29% of the total spend in 2017. The share of spend on press advertising has been on a downward trend over the entire period; in 2017 it represented 6% of the total spend whereas, in 2008, it accounted for 13%. Throughout the period, radio advertising has accounted for between 3% and 6% of the total spend; in 2017 it was 5%.

Figure 2 Percentage share of advertising spend by medium, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
TV	46.1	44.1	44.5	46.0	47.2	47.1	51.8	53.2	43.8	35.3
Outdoor	32.7	33.9	35.8	35.0	35.6	37.6	32.9	31.5	24.8	24.6
Press	13.1	11.8	11.7	11.2	11.4	10.9	12.4	11.1	7.0	6.1
Radio	5.5	6.4	4.5	3.4	3.6	3.1	2.4	3.9	2.7	5.3
Internet	2.6	3.8	3.6	4.3	2.1	3.0	*0.6*	*0.4*	*21.8*	*28.5*

Source: Nielsen Media Research

Dashed/dotted line for the internet trend indicates different methodologies for the periods 2008-2013, 2014-2015 and 2016-2017 and lack of comparability over time.

Approximately £64 million was spent on advertising UK films in 2017, up from £62 million in 2016, even though fewer UK films were released in 2017 than in 2016 (159 compared with 176). The advertising spend for studio-backed UK films was £38 million (£1.9 million per film on average, the same as in 2016). Our data on advertising spend for individual films show that the amount spent on advertising independent UK films was £26 million (an average of £186,000 per film, up from £100,000 in 2016), but this is likely to be an underestimate as some advertising spend for smaller films is not allocated to individual titles but to generic spend by distributor.

Using the information on advertising spend, and estimating Digital Cinema Package (DCP) costs, the total release costs for various release widths can be approximated. In creating a DCP, distributors incur digital mastering and duplication costs and in many instances Virtual Print Fees (the cost of booking a film that contributes to the cost of an exhibitor's conversion from analogue projection to digital projection). In the absence of any empirical data on the current average cost of a DCP, we have continued to use the same estimate as when all prints were analogue, which was typically £1,000 per print. So, taking this estimate and adding it to the Nielsen Media Research advertising spend estimate (+20% for other public relations campaigns, publicity and premiere costs), the average release cost for different levels of theatrical release can be calculated.

As Table 9 shows, for films released at the widest number of cinemas (500+) in 2017, the average cost of release was £3.3 million (up 4% from £3.2 million in 2016). Average release costs were also up across all other release widths with the exception of 400-499 sites and 200-299 sites. The largest year-on-year change was seen in films going out on 100-199 cinemas, where release costs increased by more than 50% from £270,000 in 2016 to £410,000.

Table 9 Estimated release cost by width of release, 2008-2017

	Average release cost (£ million)									
Number of sites at widest point of release	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
500+*	3.95	3.40	2.65	3.14	3.13	3.04	2.94	2.87	3.21	3.34
400 - 499	2.21	2.05	2.09	2.17	1.99	2.04	2.04	1.59	1.91	1.82
300 - 399	1.39	1.32	1.24	1.38	1.28	1.15	1.21	1.30	1.01	1.09
200 - 299	0.90	0.84	0.77	0.82	0.83	0.76	0.76	0.72	0.69	0.63
100 - 199	0.43	0.51	0.33	0.31	0.36	0.30	0.35	0.25	0.27	0.41
50 - 99	0.18	0.21	0.20	0.16	0.12	0.13	0.18	0.12	0.12	0.14
10 - 49	0.08	0.06	0.04	0.05	0.04	0.03	0.05	0.03	0.03	0.04
<10	0.01	0.01	0.01	0.01	0.01	0.01	0.01	<0.01	<0.01	<0.01

Source: Nielsen Media Research, comScore, BFI RSU analysis

Notes:

The print costs calculations assume current DCP/print costs are the same as for analogue distribution.

* We are not able to calculate release costs for 600+ locations for this edition of the Yearbook.

Table 10 shows the average cost of release by production budget for the 126 UK films released in 2017 for which budget information is available. The average release costs increased with the size of the production budget, with the largest increase being seen between films in the £5-£9.9 million range and those made for £10 million or more. However, the higher budget films are most likely to have the greatest promotional spend, in particular the large scale inward investment films backed by the major US studios which have considerable marketing budgets. The average release cost for studio-backed films with budgets of £10 million or over was £3 million while the average release cost for UK independent films in this budget band was £2.6 million.

Table 10 Estimated release cost by budget for UK films, 2017

Budget (£ million)	Number of films	Average release cost (£ million)
10+	25	2.95
5 - 9.9	13	1.14
2 - 4.9	28	0.26
0.5 - 1.9	26	0.12
<0.5	34	0.02
All films	**126**	**0.79**

Source: Nielsen Media Research, BFI RSU analysis
See note to Table 9.

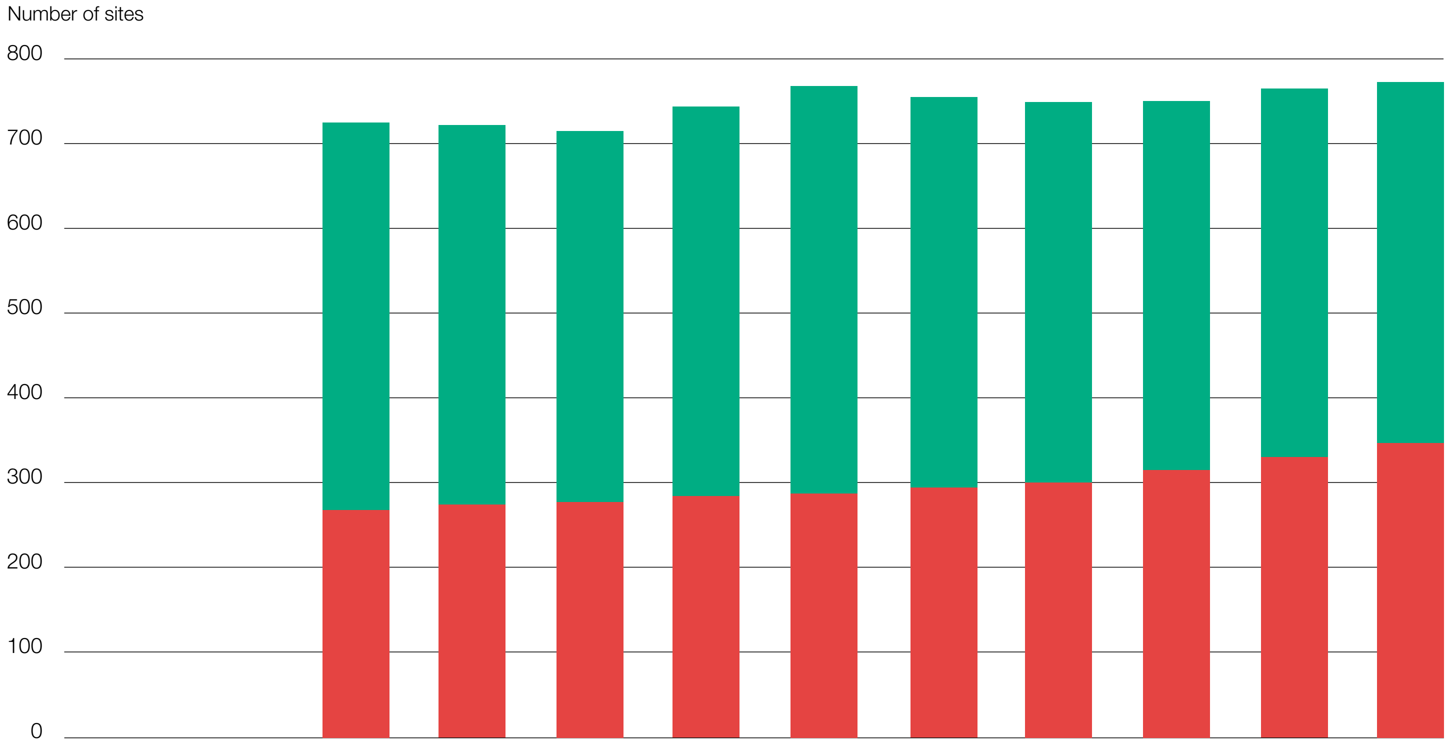
EXHIBITION

Cinemas provide the best environment for people to enjoy films as they are intended - on the big screen, with a large audience. The performance of the commercial exhibition sector is therefore an important indicator of the vitality of film culture.

UK CINEMA SITES

Figure 3 shows the number of cinema sites in the UK from 2008 to 2017. While the total number of sites has fluctuated over the period there has been a gradual rise in overall provision; there were 774 cinemas in the UK in 2017 compared with 726 in 2008. However, the make-up of sites has changed over the decade. The number of traditional and mixed use sites (mixed use cinemas are used for film screenings only part of the time) has declined, falling from 457 cinemas in 2008 to 426 in 2017, while the number of purpose-built multiplex sites has grown, rising from 269 cinemas in 2008 to 348 in 2017. Multiplex cinemas made up 45% of all sites in 2017 compared with 37% in 2008.

Figure 3 UK cinema sites by type of site, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Multiplex	269	275	278	285	288	295	301	316	331	348
Traditional and mixed use	457	448	438	460	481	461	449	435	435	426
Total sites	726	723	716	745	769	756	750	751	766	774
% multiplex sites	37.1	38.0	38.8	38.3	37.5	39.0	40.1	42.1	43.2	45.0

Source: Dodona Research, BFI RSU analysis

Notes:

Multiplexes are defined as purpose-built cinema complexes with five or more screens while excluding those that were converted from traditional cinema sites.

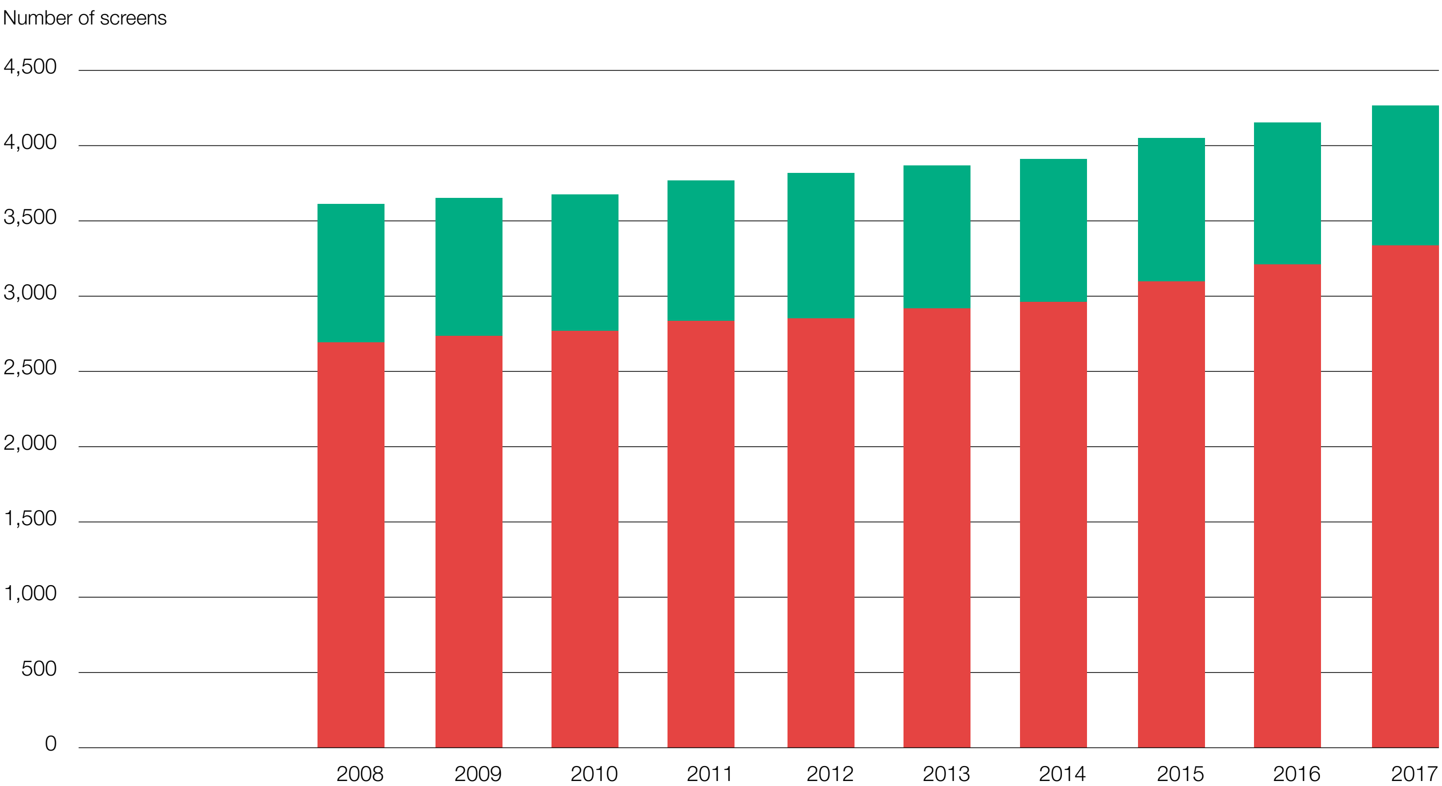
Mixed use cinemas are used for screenings only part of the time.

UK SCREENS

As Figure 4 shows, the overall number of cinema screens in the UK (excluding those operated in venues such as schools and private screening rooms) has risen every year since 2008. In 2017, the total number of screens stood at 4,264, a rise of 18% over the decade.

This growth is primarily due to an increase in multiplex provision. Over the period, the UK gained 645 multiplex screens and nine traditional or mixed use screens, while the share of multiplex screens increased from 75% to 78%. In 2017, there were 3,334 multiplex screens and 930 traditional or mixed use screens.

Figure 4 UK cinema screens by type of cinema, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Multiplex	2,689	2,735	2,767	2,833	2,851	2,915	2,959	3,096	3,209	3,334
Traditional and mixed use	921	916	904	934	966	952	950	950	941	930
Total screens	3,610	3,651	3,671	3,767	3,817	3,867	3,909	4,046	4,150	4,264
% multiplex screens	74.5	74.9	75.4	75.2	74.7	75.4	75.7	76.5	77.3	78.2

Source: Dodona Research, BFI RSU analysis
See notes to Figure 3.

SCREEN LOCATION

In 2017, 97% of all screens in the UK were located in urban or suburban locations. There were increases in the numbers of screens in all locations during the year compared with 2016 with the exception of suburban areas (where there was no change) and rural areas which lost one screen (Table 11). The largest increase numerically was seen in town and city centre cinemas, where there were 59 new screens, an increase in provision of 3% compared with 2016, whilst there were 21 new edge of centre screens (a 3.5% increase).

The table also shows that suburban and rural cinemas tend to have fewer screens on average than their urban counterparts, although town and city centre sites are also relatively small.

Table 11 Screens by location, 2008-2017

Location	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	% change 2016-2017	Average number of screens per site
Town/city centre	1,683	1,732	1,726	1,785	1,848	1,866	1,901	1,932	1,998	2,057	3.0	4.3
Out of town	1,303	1,297	1,311	1,335	1,310	1,328	1,335	1,413	1,422	1,457	2.5	10.1
Edge of centre	499	498	506	518	523	534	540	561	592	613	3.5	8.6
Suburban	30	27	28	28	27	26	25	26	29	29	-	1.9
Rural	95	97	100	101	109	113	108	114	109	108	-0.9	1.6
Total	**3,610**	**3,651**	**3,671**	**3,767**	**3,817**	**3,867**	**3,909**	**4,046**	**4,150**	**4,264**	**2.7**	**5.5**

Source: Dodona Research, BFI RSU analysis

SCREEN DENSITY AND ADMISSIONS PER HEAD OF POPULATION – INTERNATIONAL COMPARISONS

A standard way to gauge the level of cinema provision is by 'screen density', ie the number of screens per unit of population. According to IHS, in 2017, screen density in the UK was 6.5 screens per 100,000 people, a slight increase from 6.4 in 2016. This level of access to screens falls short of that in other major film territories: USA (12.4), France (9.1), Australia (9.0), Spain (7.6) and Italy (6.6). Germany's screen density, at 5.3 screens per 100,000 people, is less than the UK's. (The world's fastest expanding territory China, had 3.6 screens per 100,000 people in 2017.)

Table 12 shows the level of admissions per head of population in a number of major film territories. The UK saw more admissions per head (2.6) than Spain, Italy and Germany despite having a lower screen density than Spain and Italy. Of the selected territories, Australia (3.7) and the USA (3.5) had the highest admissions per head of population.

Table 12 Admissions per head of population in selected major film territories, 2008-2017 (ranked by 2017 admissions)

	Australia	USA	France	UK	Spain	Italy	Germany
2008	3.9	4.1	3.2	**2.7**	2.3	1.7	1.6
2009	4.1	4.2	3.4	**2.8**	2.4	1.6	1.8
2010	4.1	4.0	3.5	**2.7**	2.2	1.8	1.5
2011	3.8	3.8	3.6	**2.7**	2.1	1.7	1.6
2012	3.7	3.9	3.4	**2.7**	2.0	1.5	1.7
2013	3.7	3.8	3.2	**2.6**	1.7	1.6	1.6
2014	3.3	3.6	3.1	**2.4**	1.9	1.5	1.5
2015	3.6	3.9	3.1	**2.6**	2.0	1.6	1.7
2016	3.7	3.6	3.3	**2.6**	2.2	1.8	1.5
2017	3.7	3.5	3.2	**2.6**	2.2	1.6	1.5

Source: IHS

SCREEN DENSITY AND ADMISSIONS PER HEAD OF POPULATION IN THE UK

As in previous editions of the Yearbook we are able to present screen provision data based on two types of regional classification. The datasets are not directly comparable because of differences in the way the regions are defined; they do, however, shed light on different aspects of national and regional variation in screen provision.

The Cinema Advertising Association produces monthly admissions totals for each of the television advertising regions used by the Incorporated Society of British Advertisers (ISBA). Screen and admissions data for 2017 using these television regions are presented in Table 13. The population figures for the ISBA regions are based on the Broadcasters' Audience Research Board (BARB) 2017 population estimates and so the UK total shown in this table is higher than the UK population shown in Table 14 which is based on the official mid-2014 population estimates. The higher UK population total figure shown in Table 13 also results in the figures for screen density shown in this table being different to the corresponding IHS estimates.

Although London had the greatest numbers of screens and sites, its screen density, at 7.0 screens per 100,000 people, was lower than that of Northern Ireland (11.6), Central Scotland (7.3) and the Midlands (7.1). The South and South East had the lowest screen density (5.3) of all the ISBA regions.

The average cost of a cinema ticket in the UK in 2017, calculated by dividing the UK-only box office gross (£1,280 million) by total UK admissions (170.6 million), was £7.49, up from £7.30 in 2016.

For the first time we are able to approximate the average price of cinema tickets by region. There is a wide variation in ticket prices across the country, with an average ticket in London being over 80% more expensive than in Northern Ireland which had both the lowest average ticket price (£4.94) and the highest admissions per head of population (3.1) of any region. However, the correlation between low ticket prices and admissions does not relate to London which has the second highest admissions per head (3.0) but also substantially the highest average ticket price (£8.94) which is £1.50 higher than the UK average.

Table 13 Screens and admissions by ISBA TV region, 2017 (ranked by screens per 100,000 people)

ISBA TV region	Screens per 100,000 people	Screens	% of total screens	Sites	Population (000)*	Admissions (million)	Admissions per screen	Admissions per head	Average ticket price (£)
Northern Ireland	11.6	220	5.2	30	1,859	5.8	26,366	3.1	4.94
Central Scotland	7.3	271	6.4	41	3,741	11.2	41,212	3.0	7.28
Midlands	7.1	625	14.7	109	8,772	20.6	32,931	2.3	7.19
London	7.0	932	21.9	163	13,422	40.0	42,897	3.0	8.94
North West	6.7	472	11.1	66	7,033	16.2	34,231	2.3	7.21
Wales and West*	6.4	348	8.2	76	5,421	13.0	37,276	2.4	6.82
Northern Scotland	6.3	82	1.9	20	1,328	3.5	42,148	2.6	6.68
South West	6.3	113	2.7	33	1,838	4.0	35,301	2.2	6.70
North	5.6	356	8.3	61	6,354	14.1	39,714	2.2	7.13
East	5.5	270	6.3	52	4,903	14.0	51,944	2.9	7.42
Border	5.5	33	0.8	16	615	1.1	32,186	1.7	6.97
North East	5.5	153	3.6	26	2,760	6.7	43,552	2.4	6.65
South and South East	5.3	389	9.1	81	7,387	20.6	53,015	2.8	7.37
Total	**6.5**	**4,264**	**100.0**	**774**	**65,434**	**170.6**	**40,013**	**2.6**	**7.49**

Source: Dodona Research, BARB, Cinema Advertising Association (CAA), BFI RSU analysis

Notes:

* BARB population estimates based on the 2017 UK population, and so the UK total is higher than the UK population shown in Table 14 which is the official mid-2014 population estimate.

Figures may not sum to totals due to rounding.

Table 14 gives screen information for each of the English regions, plus Scotland, Wales and Northern Ireland. Northern Ireland had the highest number of screens per 100,000 people in 2017 (12.0), followed by London (7.5), the South East (7.3), and Scotland and the South West (both with 6.8). The East of England had the fewest screens per 100,000 people at 4.7 screens followed by the East Midlands which had 5.0 screens.

Table 14 Screens and population in the nations and regions, 2017 (ranked by screens per 100,000 people)

Nation/region	Screens	% of total screens	Sites	Population (000)*	Screens per 100,000 people	Average number of screens per site
Northern Ireland	220	5.2	30	1,840	12.0	7.3
London	641	15.0	111	8,539	7.5	5.8
South East	648	15.2	132	8,874	7.3	4.9
South West	370	8.7	84	5,423	6.8	4.4
Scotland	363	8.5	67	5,348	6.8	5.4
Wales	207	4.9	50	3,092	6.7	4.1
North West	474	11.1	68	7,133	6.6	7.0
West Midlands	349	8.2	55	5,713	6.1	6.3
Yorkshire and The Humber	320	7.5	55	5,360	6.0	5.8
North East	140	3.3	21	2,619	5.3	6.7
East Midlands	230	5.4	44	4,637	5.0	5.2
East of England	285	6.7	53	6,018	4.7	5.4
Other**	17	0.4	4	n/a	-	4.3
England sub-total	3,457	81.1	623	54,317	6.4	5.5
Total	**4,264**	**100.0**	**774**	**64,597**	**6.6**	**5.5**

Source: Dodona Research, Office for National Statistics (ONS), BFI RSU analysis

Notes:

* ONS Mid-year population estimates 2014.

** Other includes the Channel Islands and the Isle of Man.

n/a = not available.

Figures/percentages may not sum to totals due to rounding.

Table 14 also shows that Northern Ireland and the North West had the highest averages for screens per site at 7.3 and 7.0 respectively. The South West and Wales along with 'other' (which includes the Channel Islands and the Isle of Man) had the lowest averages for screens per site showing a tendency towards smaller cinemas and, particularly for the South West and 'other', proportionally fewer multiplex screens (Table 15).

TYPE OF CINEMA SCREENS BY NATION AND REGION

Table 15 provides a snapshot of variations in multiplex provision around the UK. The South East had the largest number of multiplex screens (491) in 2017, followed by London (444) and the North West (430). Northern Ireland had the highest proportion of multiplex screens (92%) followed by the North West (91%) and North East (90%). In England the lowest concentration of multiplex screens was found in the South West (63%), which had a high number of traditional and mixed use screens (the third highest after London and the South East). London had the highest number of traditional and mixed use screens but its percentage of multiplex screens, at 69%, was the second lowest in England. Across the nations, after Northern Ireland, Wales had the highest proportion of multiplex screens (80%), followed by England and Scotland, both of which had 77%.

Table 15 Cinema screens by type by nation or region, 2017 (ranked by percentage multiplex)

Nation/region	Multiplex	% multiplex	Traditional and mixed use	Total
Northern Ireland	202	91.8	18	220
North West	430	90.7	44	474
North East	126	90.0	14	140
Yorkshire and The Humber	265	82.8	55	320
East Midlands	185	80.4	45	230
West Midlands	279	79.9	70	349
Wales	165	79.7	42	207
East of England	223	78.2	62	285
Scotland	280	77.1	83	363
South East	491	75.8	157	648
London	444	69.3	197	641
South West	234	63.2	136	370
Other*	10	58.8	7	17
England sub-total	2,677	77.4	780	3,457
Total	**3,334**	**78.2**	**930**	**4,264**

Source: Dodona Research, BFI RSU analysis

* Other includes the Channel Islands and the Isle of Man.

MAINSTREAM, SPECIALISED AND SOUTH ASIAN PROGRAMMING

Dodona Research categorises screens according to whether they show mostly mainstream, specialised (ie non-mainstream, including 'arthouse') or South Asian films.

Table 16 shows that by far the majority of screens primarily show mainstream films. In 2017, 609 cinemas with 3,946 screens showed mostly mainstream films (a 2% increase in the number of both sites and screens compared with 2016). There were 162 sites (21% of all sites) with 312 screens (7% of screens) showing mainly specialised films and three cinemas (0.4% of all sites) with six screens (0.1% of all screens) dedicated mainly to South Asian films. The number of both sites and screens showing mostly specialised films increased by 2% in 2017 compared with 2016.

Table 16 Sites and screens by programme, 2008-2017

Programme	Sites									
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
South Asian	4	4	3	3	3	2	2	3	3	3
Specialised	168	168	163	171	177	168	165	153	159	162
Mainstream	554	551	550	571	589	586	583	595	604	609
Total	**726**	**723**	**716**	**745**	**769**	**756**	**750**	**751**	**766**	**774**
Programme	Screens									
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
South Asian	10	10	7	7	7	4	4	6	6	6
Specialised	250	253	248	259	268	265	275	280	300	312
Mainstream	3,350	3,388	3,416	3,501	3,542	3,598	3,630	3,760	3,844	3,946
Total	**3,610**	**3,651**	**3,671**	**3,767**	**3,817**	**3,867**	**3,909**	**4,046**	**4,150**	**4,264**

Source: Dodona Research, BFI RSU analysis

For the second consecutive year since our analysis began, the majority of specialised screens (54%) were found in chain cinemas rather than single, independent venues. This is partly a result of recent increases in the number of sites owned by arthouse cinema chains such as Everyman and Picturehouse (itself owned by Cineworld) which have a broader programming focus than the larger exhibitors.

The pattern of programme type by location in 2017 is shown in Table 17. Screens showing mostly South Asian films were located in town or city centres and suburban areas, while those devoted to specialised film were found mainly in town or city centres. The overall pattern remained similar to earlier years.

Table 17 Percentages of screens by location and programme, 2017

Location	Mainstream	Specialised	South Asian	Total
Town/city centre	45.1	88.1	66.7	48.2
Out of town	36.8	1.6	-	34.2
Edge of centre	15.4	1.3	-	14.4
Suburban	0.4	3.5	33.3	0.7
Rural	2.3	5.4	-	2.5

Source: Dodona Research, BFI RSU analysis

This geographical analysis is extended in Table 18, which shows the distribution of specialised screens around the UK. Screens showing mainly specialised films were concentrated in London and the South East, which jointly accounted for 50% of the UK total in 2017. Yorkshire and The Humber had 28 specialised screens (9% of total screens) and Scotland and the South West both had 25 (8%). Northern Ireland (0.6%), the North East (1.9%) and Wales (2.9%) had the smallest shares of specialised screens.

The six screens showing South Asian films were found in only three cinemas, two in London and the other in Leicester in the East Midlands.

Table 18 Geographical spread of specialised screens, 2017

Nation/region	Number of specialised screens	% of specialised screens
London	108	34.6
South East	49	15.7
Yorkshire and The Humber	28	9.0
South West	25	8.0
Scotland	25	8.0
East of England	19	6.1
East Midlands	14	4.5
North West	14	4.5
West Midlands	13	4.2
Wales	9	2.9
North East	6	1.9
Northern Ireland	2	0.6
Total	**312**	**100.0**

Source: Dodona Research, BFI RSU analysis

Image: *Tiger Zinda Hai* courtesy of Yash Raj Films

EXHIBITORS

The UK exhibition sector is made up of a small number of larger exhibitors which own and operate the majority of sites and screens and a large number of smaller companies with one or two sites and screens. At the end of 2017, the three largest exhibitors owned 38% of all UK cinemas and 64% of UK screens.

Table 19 shows that in 2017, 17 exhibitors owned or programmed 20 or more screens in the UK. (This is the same number as in 2015 and 2016.) Collectively, these exhibitors have gained 13 sites since 2016 and 138 screens. The largest increases were recorded by Cineworld, which added four sites and 54 screens, and Vue, which added two sites and 33 screens. Two of the 17 exhibitors lost sites and screens during the year: Odeon's cinema stock fell by one site and 10 screens, while Reel Cinemas lost one site and three screens.

Table 19 Cinema screens by exhibitors with 20 or more screens, 2017

Exhibitor	Sites	Screens	% of total screens
Cineworld	99	1,008	23.6
Odeon	110	877	20.6
Vue	86	831	19.5
National Amusements	21	278	6.5
Empire Cinemas	14	129	3.0
Omniplex	14	110	2.6
Picturehouse (Cineworld)	24	72	1.7
Everyman Media Group	23	69	1.6
Light Cinemas	8	62	1.5
Reel Cinemas	14	59	1.4
Merlin Cinemas	15	42	1.0
Curzon	15	41	1.0
Movie House Cinemas	5	39	0.9
Irish Multiplex Cinemas	5	34	0.8
PDJ Cinemas	5	22	0.5
Savoy Cinemas	4	21	0.5
Parkway Entertainment	4	20	0.5
Other (16 major exhibitors and 258 independent single venue exhibitors)	308	550	12.9
Total	**774**	**4,264**	**100.0**

Source: Dodona Research

Notes:

Figures correct as at December 2017.

Percentages may not sum to 100 due to rounding.

Cineworld was the only publicly-quoted exhibitor in the UK. It was formed in 1995 and acquired the former Cine-UK and UGC chains in 2004. It also acquired Picturehouse in 2012.

In 2016, the Odeon chain was bought by AMC Entertainment, a US cinema chain owned by Chinese conglomerate Dalian Wanda, the world's largest cinema operator. It was previously owned by Terra Firma Capital Partners, a European private equity firm.

Vue, which acquired Warner Village cinemas in 2003 and the Apollo cinema chain in 2012, was sold to Canadian investors Omers Private Equity and Alberta Investment Management in 2013.

National Amusements was owned by the family of Sumner Redstone, chairman of US media giant Viacom.
Empire is owned by the Anderson family. It emerged as a buyer of sites from UCI and Odeon in 2005 and UGC and Cineworld in 2006, which were divested as a result of the companies' mergers.

EXHIBITOR REVENUES

As Table 20 shows, the top six exhibitors had a 79% share of overall box office receipts in the UK and Republic of Ireland in 2017; 69% of the box office was shared between the top three exhibitors.

Dodona Research reports that exhibitors' revenues from refreshment sales in 2017 were £466 million, an increase of 3% compared with 2016 (£452 million). The average spend on refreshments per individual visit increased from £2.69 to £2.73.

Table 20 Exhibitor share of box office in the UK and Republic of Ireland, 2017

Exhibitor	Market share (%)	Box office gross (£ million)*
Cineworld	24.8	317.1
Odeon	24.2	309.4
Vue	20.0	255.7
National Amusements	5.7	72.9
Picturehouse (Cineworld)	2.4	30.7
Empire Cinemas	2.0	25.6
Sub-total	**79.1**	**1,011.4**
Other	20.9	267.2
Total	**100.0**	**1,278.7**

Source: Dodona Research and comScore

Notes:

* Box office gross is for all films on release in 2017. This includes titles which were first released in 2016.

Figures/percentages may not sum to totals/sub-totals due to rounding.

DIGITAL PROJECTION

Since 2014, nearly every screen in the UK has been capable of digital projection. The digitisation of cinema projection has increased the scope for making a wider range of films available to audiences and allowed for the introduction of subtitles for the hearing impaired and audio description for the visually impaired. Audiences are also now able to watch films in digital 3D and access a wide range of alternative content programming, such as live screenings of cultural and sporting events.

ACCESSIBLE CINEMA

All UK cinemas now have English language subtitle/caption and audio description (ST/AD) facilities. Almost every multiplex cinema and many smaller cinemas regularly screen the latest popular releases with on-screen English language captions. Around 1,500 such screenings are provided weekly, by more than 60 exhibitors, in around 600 cinemas nationwide (over three quarters of sites). The estimated audience for these screenings in 2017 was 1.2 million, and they generated approximately £8.8 million in box office revenues. (It should be noted that these revenue figures exclude the impact of a popular discount scheme which allows free access to carers accompanying disabled cinema-goers, so the actual box office figures may be lower.)

Data from 'YourLocalCinema.com' shows that in 2017, 172 English language films were shown in UK cinemas with captions and 167 were shown with audio description.

Over the last decade more than 1,000 titles have been made accessible to sight or hearing impaired audiences, including almost all of the top 10 films of each year. All of the top 20 films at the UK box office in 2017 had ST/AD tracks.

3D AND EVENT CINEMA

According to IHS, of the 4,309 digital screens in the UK at the end of 2017, 2,030 (47%) were 3D-capable digital screens. (The total number of screens differs here to the figure used previously because of the different methodologies employed by IHS and Dodona Research.) Some of the popular 3D screenings in 2017 included *Star Wars: The Last Jedi*, *Beauty and the Beast* and *War for the Planet of the Apes.*

Table 21 shows the increase in the number of 3D digital screens in the UK since 2008. The growth in such screens coincided with an increase in the availability of 3D content internationally. In 2017, 37 films were released in 3D (nine less than in 2016).

Table 21 3D digital screens in the UK, 2008-2017

Year	Number of 3D digital screens	Total digital screens	3D % of all digital screens	Top performing digital 3D title in the UK and Republic of Ireland
2008	69	310	22.3	Fly Me to the Moon
2009	449	642	69.9	Avatar
2010	1,067	1,415	75.4	Toy Story 3
2011	1,475	2,714	54.3	Harry Potter and the Deathly Hallows: Part 2
2012	1,564	3,538	44.2	The Hobbit: An Unexpected Journey
2013	1,655	3,868	42.8	Gravity
2014	1,772	3,946	44.9	The Hobbit: The Battle of the Five Armies
2015	1,854	4,123	45.0	Star Wars: The Force Awakens
2016	1,908	4,231	45.1	Rogue One: A Star Wars Story
2017	2,030	4,309	47.3	Star Wars: The Last Jedi

Source: IHS, comScore, BFI RSU analysis

Notes:

3D digital screens are capable of screening content made in stereoscopic 3D format.

Top performing digital 3D titles in the UK and Republic of Ireland are based on takings from 3D and IMAX 3D screenings.

Event cinema, alternative content or non-feature film programming has become a regular feature in the UK over recent years following the shift to digital projection. The roll-out of a digital screen base has widened the range of content available on the big screen, allowed for greater interactivity between the screen and the audience and has potentially improved the use of auditorium capacity during typically quiet periods. Also, since events are usually shown only once or twice (often as a simultaneous screening of a live performance or event and a subsequent catch-up screening) they can often generate higher occupancy rates than feature films.

Table 22 shows the number of events and box office takings by type of event screened in 2017. According to comScore, 134 events, the majority of which were live, were screened in the year, down from 177 in 2016. However, these events generated a total box office of £34 million compared with £33 million in 2016. Screenings of opera productions were the most popular form of alternative content programming in the year with 35 performances (26% of all events), while screenings of theatre performances generated the highest earnings (£11 million), a 32% share of the total box office.

Table 22 Number and box office takings of events screened in UK cinemas by type of event, 2017 (ranked by gross box office)

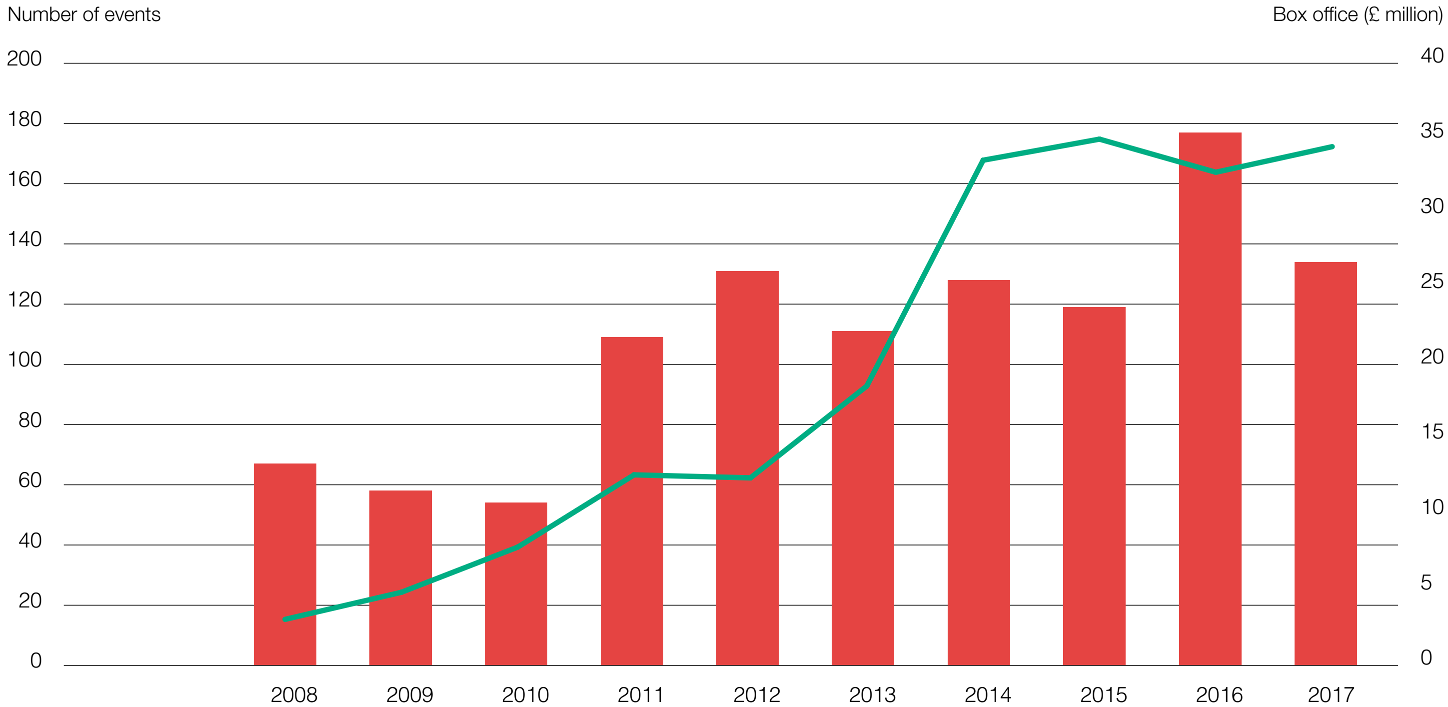
Type of event	Number of events	% of events	Box office (£ million)	% of box office
Theatre	25	18.7	11.1	32.3
Opera	35	26.1	6.8	19.8
Film/documentary	14	10.4	5.7	16.6
Ballet/dance	15	11.2	4.6	13.4
Popular music concert	9	6.7	2.0	5.9
Classical concert	5	3.7	1.6	4.7
TV	9	6.7	1.5	4.3
Exhibition	15	11.2	0.7	1.9
Sport	3	2.2	0.2	0.6
Talk	4	3.0	0.2	0.5
Total	**134**	**100.0**	**34.5**	**100.0**

Source: comScore

Note: Percentages/figures may not sum to totals due to rounding.

Figure 5 shows the number of event cinema screenings and their associated box office earnings over the last 10 years. Since 2011, the number of events screened annually has ranged between 110 and 130, although it was as high as 177 in 2016. There has been a general upward trend in box office over the period with a large spike between 2012 (£12.5 million) and 2014 (£33.6 million), since when revenues have remained at between £33 million and £35 million annually.

Figure 5 Number of events screened and box office earnings, 2008-2017



	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Number of events	67	58	54	109	131	111	128	119	177	134
Box office (£ million)	3.1	4.9	7.9	12.7	12.5	18.6	33.6	35.0	32.8	34.5

Source: comScore

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